

DISTRICT 11

**2002-2003 ANNUAL PRO BONO
REPORT AND PLAN**

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A. Abstract-

Please summarize the current status of your Committee's planning process. Your summary should include the District Committee's mission statement, a history of the organization, a description of the current legal services delivery system, as well as identification, categorization and prioritization of the legal problems experienced by indigent individuals within the counties of your District. Please include additional information you deem to be relevant to a complete description of the current status of your Committee.

To assure low and middle-income civil litigants access to the court by increasing private attorney involvement, making pro se forms understandable and available, and offering educational material and instruction.

Bartholomew Area Legal Aid, Inc. (BALA) was founded in 1982 by the Bartholomew County Bar Association after the closing of Bartholomew County's Legal Services Office. The agency's main mission is to refer needy clients to pro bono attorneys. Initially volunteer lawyers interviewed potential clients, determined eligibility and represented eligible clients. Since the time of the agency's inception, BALA handles screening, eligibility and placement in house. In 2000, BALA became the agency in charge of implementing State Judicial District 11's pro bono plan. This increased BALA's coverage area to include Bartholomew, Brown, Decatur, Jackson and Jennings counties. BALA collaborates with many of the area's social service providers including Turning Point Domestic Violence Shelter and the Lincoln-Central Neighborhood Family Center. The agency started with a half time employee in 1982, and it has grown to a 3.5 FTE agency. A full time executive director, a program director/attorney, an office manager and administrative assistant are employed by the agency. BALA has five regular office volunteers who intake clients and assist operations in the office. BALA also has a volunteer pro bono coordinator who places clients who are receiving referrals to area attorneys. The presence of volunteers frees staff to do more individual casework with clients and support work for attorneys handling cases.

BALA and Indiana Legal Services Bloomington Office (ILS-B) coordinate to deliver legal services to District 11. BALA screens applicants for services, determines what services an applicant is eligible for, and provides that service. ILS-B also screens applicants for District 11 and in cases where the applicant's legal needs fit their program's parameters, they provide legal services. In cases when their program cannot serve the applicant, they forward the client to BALA for services.

B. DATA

1. In the following space, please list the following information about the Committee members: name, organization affiliation (if any), address, phone, fax and E-mail address. Please include what category listed in rule 6.5 (f) (1) this person is representing. Please indicate if members represent more than one organization or category. Please include the judicial appointee and if applicable the District plan administrator at the top of this page.

Heather M. Mollo
Bartholomew Circuit Court
234 Washington Street
Columbus, IN 47201
(812) 373-4408
FAX (812) 379-1764
E-mail: hmollo@bartholomewco.com
Judge

Tammara Sparks
Staff Attorney
Bartholomew Area Legal Aid, Inc
1971 State Street
Columbus, IN 47201
(812) 378-0358
FAX (812) 372-3948
Pro bono provider

Dom Glover
President, Bartholomew Co. Bar Assoc.
P.O. Box 67
Columbus, IN 47202-0067
(812) 376-8266
FAX
E-mail: dwglover@iquest.net
Bar representative

James T. Roberts
President, Brown Co. Bar Assoc.
P.O. Box 26
Nashville, IN 47448
(812) 988-6671
FAX (812) 988-1842
E-mail Roblaw@.net
Bar representative

C. Robert Moats
Director, Bartholomew Area Legal Aid Inc.
1971 State Street
Columbus, IN 47201
(812) 372-8933
FAX (812) 372-3948
E-mail bala@iquest.net
Pro bono provider

Margaret A. Polanski
President, Decatur Co. Bar Assoc.
125 W. Washington Street
Greensburg, IN 47240
(812) 663-4923
FAX
E-mail
Bar representative

Judge William Vance

Joseph M. Robertson, II

**Circuit Court Judge
Jackson County**
P.O. Box 315
Brownstown, IN 47220-0315
(812) 358-6133
FAX (812) 358-4689
District 11 Chair

President, Jackson Co. Bar
P.O. Box 972
Seymour, IN 47274
(812) 523-3120
FAX (812) 523-3132

Charlene Melton
**Jennings County Council on Domestic
Violence**
PO Box 353
Vernon, IN 47282
Community at Large Representative
(Jennings County)

Thomas M. Frohman
**Sr. Attorney, Legal Services
Organization**
242 W. 7th Street
Bloomington, IN 47404
(812) 339-7668
FAX (812)339-2081
E-mail
Pro bono provider

Amy Oliver
**Turning Point Domestic Violence Shelter
Advocate**
123 Washington Street
Columbus, IN 47201
(812) 373-2808
FAX (812) 372-2817
Community-at-Large
(new member 2001)

2. Governance - Briefly describe the organizational structure of your District, including replacement and succession of members, and terms of service.

The District 11 committee met semi-annually to discuss the operations of the district and to review plans for the coming year. The committee has on it representation from BALA, ILS-Bloomington, the county bar associations and the social services networks in each county.

In 2002, the District 11 committee's chair transferred from Judge Heather Mollo from Bartholomew and Brown counties to Judge William Vance from Jackson County. This year, BALA's Board of Directors will be enveloping the District 11 committee. The board will establish a District 11 committee of the board that will be made up of representatives of each county. BALA's board of directors elects officers and new board members at their annual meeting in the spring of every year. Officer terms starting in 2003 will be one year. Board terms have yet to be decided.

3. History/Background - Please list all counties in the District, any pro bono organizing activity or efforts at coordination that existed prior to the formation of the Rule 6.5 Committee.

Bartholomew, Brown, Decatur, Jackson and Jennings counties comprise District 11. BALA and ILS-B were the only two programs that coordinated any pro bono work in District 11 before the formation of the Committee. Both programs collaborate by referring clients openly and by serving as a legal and community resource for each other. ILS and BALA have different case acceptance policies and different priorities for service. Applicants to either entity are sent to the agency that is best equipped to suit their needs.

4. Plan Administrator - Rule 6.5(g)(2) requires each Committee to select and employ a plan administrator to provide the necessary coordination and administrative support for the District Pro Bono Committee. Please indicate the name of the person, the duties of the plan administrator, if that position is funded and if so, the source of those funds.

BALA is the plan administrator for District 11. BALA's Executive Director C. Robert Moats is primarily responsible to report on behalf of the District. BALA's duties are to screen applicants through an intake process where information is collected on the individual and their case. BALA uses that information to decide if the applicant is eligible for any services, and which services would best suit their needs. In one case in four, an applicant is forwarded on to pro bono attorney. In the majority of the cases the applicant is ineligible, does not follow through on their application, receives brief legal service or advice, or they handle the case pro se.

BALA is funded locally through the United Way of Bartholomew County, the Irwin-Sweeny Miller Foundation, and the Cummins Foundation. BALA also receives IOLTA, a Victims of Crime Act grant, Community Legal Aid Funds, and an Indiana Fatherhood grant. Altogether BALA has a financial budget of around \$135,000.

5. Monitoring Role - Briefly describe how the District Committee will evaluate and record the progress and success of the District Plan.

(a) Quality of services provided:

By measuring the result of the case, BALA can track the quality of service received. In measuring short-term quality, case decisions are vital in seeking what impact the services had on the client. To measure long term, BALA will develop a system of client tracking to see how the solving of the legal problem for a client assisted them six months after their case closing. This tracking will be done by verbal interview.

(b) Quantity:

(i) number of attorneys participating

BALA developed a spreadsheet of all attorneys in the district measuring how many cases the attorney took, the result of the case, and the total number of hours spent doing pro bono work

(ii) number of clients served

BALA measures the number of applications taken, the services provided that client, the reason a case was closed, and the final result of that closing.

(iii) number of hours

Before a client is referred, BALA internally tracks what services are provided to them and the time spent working with a client on a case. Once the case is referred, BALA has the pro bono attorney track the time spent with the client much like they would track billable hours. Thus BALA can point to each client and see how many hours were spent by the agency and by the pro bono attorney in taking care of his or her case.

(c) Costs associated with achieving goals:

Most of BALA's budget goes towards personnel costs. Intake, prioritizing, referring, tracking, closing and evaluating each case that is referred or assisted is a time intensive process for the agency. Because BALA is a United Way agency in Bartholomew County and due to the fact that BALA administers state grants, budgetary reviews and frequent monitoring are done to track the expenses of the agency.

BALA's board and the Executive Director, through measuring how much is being spent versus the numbers of clients served by BALA, has an excellent estimation of what the costs of maintaining and expanding programs are. Through monitoring internal processes for clients, the executive director can better ascertain the true costs of serving clients, find ways to curtail those costs, and work with BALA staff and board to keep costs as controlled as possible.

C. Annual Report: Existing Services, Programs, and Funding Sources - Please provide a detailed description of existing service providers, programs and funding sources currently in existence within your District. Please utilize the worksheets on the following pages for each entity and fill out the legal service provider annual progress report for each entity and the district annual progress report.

Bartholomew Area Legal Aid, Inc. is the only pro bono service provider in District 11. Indiana Legal Services-Bloomington also provides legal services in the district. Both agencies collaborate frequently by referring cases to one another and by sharing legal expertise on some issues. The relationship between BALA and ILS-Bloomington is one of collaboration and not competition. Both agencies serve a similar clientele, however they specialize in different areas of assistance. ILS-Bloomington main specialty is in the area of public benefits law i.e. disability, unemployment compensation, TANF, Medicare, Medicaid, etc. BALA, however, specializes more in family law issues such as divorce, child support, visitation, and custody. Both also share work in areas of consumer law, landlord-tenant law, and employment law.

Turning Point, a domestic violence victim services provider, has a legal advocate in Bartholomew County. This position works to help victims who need protective and restraining orders. The legal advocate assists clients who file for their orders pro se by giving legal advice and assisting in filling out paperwork. BALA works closely with this program by referring clients to the advocate, by providing some back up services for the advocate and by taking referrals for more long term legal needs from the advocate. Funding sources for BALA are varied and diverse. They are listed with their 2002 contributions in Appendix A.

BALA has spent the last two years building capacity in Brown, Decatur, Jackson and Jennings counties. Overall, BALA has over 80% of the eligible attorneys in each county's bar association on its pro bono panel. This participation drives BALA's annual capacity to over 400 referred cases per year. This success allows the district to better track participants and to measure the overall impact the program has on the lives of the recipients.

EXISTING SERVICE/PROGRAM

Service/Program Name: Bartholomew Area Legal Aid Inc.

Mailing Address: 1971 State Street; Columbus, IN 47201

Phone: (812) 372-8933

Agency Director: C. Robert Moats

Service/Program Information:

Target Population: Impoverished clients with civil legal cases that are incapable of generating legal fees.

Eligibility Requirements: Client must have income below 125% of poverty level and have a civil case that cannot generate fees on its own.

Service Area: District 11 (Bartholomew, Brown, Decatur, Jackson and Jennings Counties)

Type of Service/Program:

Estimate of Expense per Year: \$135,000 per year

Funding Source(s): See Appendix A

Service /Program Description: Bartholomew Area Legal Aid (BALA) evaluates and assists clients on civil legal matters which cannot generate revenue. BALA provides pro bono referral, assistance with pro se, brief advice and services, and links clients to the social services community.

Bartholomew Area Legal Aid, Inc.
Annual Progress Report

	Bartholomew Area Legal Aid, Inc.
Screened Cases	1,577
Assigned Cases	368
Closed Cases	890
Declined Cases	232
Open Cases (in house)	87
Number of Volunteer Attorneys	112

List Number of Cases of Each Type	Bartholomew Area Legal Aid, Inc.
Consumer/Finance	168
Education	4
Employment	28
Family	1097
Juvenile	12
Health	9
Housing	98
Income Maintenance	63
Individual Rights	10
Other*	88
Total Number of Cases	1577

D. 2002-2003 Annual Plan:

Problem/Barrier #1:

The amount of time it takes to refer a client after they make an application.

What data supports your statement of the problem?

The average wait for a pro bono attorney in District 11 is:

55.4 days in Bartholomew County

56.4 days in Brown County

37.2 days in Decatur County

50 days in Jackson County

36.8 days in Jennings County

Description:

There is limited capacity of the total number of pro bono referrals BALA can make in the course of a single year. In a large number of cases, pro se filing and brief counsel and advice services can assist a client greatly. BALA's Program Director assists clients in filling out pro se paperwork and coaches them on what to say in court. In cases of no child/no property divorce or paternity establishment, a client can file and represent themselves pro se in a more efficient and effective manner. By having the Program Director assisting clients with brief services, counsel and advice services, BALA is capable of giving legal assistance that can solve some problems without having to make a referral.

BALA can ascertain which cases should be referred to an attorney, which cases can be handled pro se, which cases can be solved with a brief service, and which cases are without merit through an intricate screening process that asks many questions about the case and the client. The Program Director, an attorney that reviews every case, can do a great deal to maximize the ability of BALA to serve District 11 by filtering cases that do not necessarily need a pro bono attorney out and using the pro bono pool for cases that most need the services.

BALA will, to help solve this problem, establish a toll free public line number. This action should make it easier for clients to contact BALA with needed information such as change of address, change of case circumstances, and to ask questions of the agency. BALA staff, by using the phone, mail and Internet, can track clients and make adjustments on services. This increased diligence can better improve how BALA refers clients and how long it takes to make a referral.

Problem/Barrier #2:

Clients who do not follow through with legal actions even after they were referred to an attorney who has helped them with their legal goals.

What data supports your statement of the problem?

12% of clients withdraw from case after referral.

31% of clients withdraw from case after application.

What activities will the attorneys in your District take to address this barrier or problem? For each checked activity, please provide a detailed description of your District's plan for implementing this activity.

BALA plans to better track the progress of cases by contacting clients on the waiting list and attorneys that we referred cases too more often. By keeping in a closer contact with clients who call BALA and are on the waiting list for an attorney, vital information can be obtained about their current case and the need for legal services can continue to be placed at the forefront of the client's agenda. Many BALA clients face daily crises that make long term planning and follow through difficult. By keeping consistent communication with our clients, BALA can better assist those clients with keeping their necessary legal needs at the forefront.

By communicating with attorneys after referral, BALA can better assess the number of active cases a pro bono attorney is working on. If five cases are referred to an attorney over the course of a year and four clients do not follow through, that attorney will get minimal credit hours for taking the case. By knowing which attorneys have clients that abandon them, BALA can more efficiently send cases to attorneys with a lesser burden. By knowing when cases are winding down, when clients abandon their attorney or when cases are stagnant, BALA is better able to know what attorneys can handle new referrals. This tracking could expand pro bono capacity to over 400 cases per year.

By keeping in contact with clients before referral and with attorneys after referral, BALA can help better facilitate pro bono services in District 11.

Problem/Barrier #3:

Clients need to access other social services to fully solve their legal issue.

What data supports your statement of the problem?

- 1) Victims of domestic violence should have available shelter, clothing, employment opportunities, mental health, childcare and other services in order to make a divorce from their abusive spouse feasible.
- 2) Tenants who are evicted from their apartments or homes will have a short-term need for transitional housing and may have needs for food and clothing.
- 3) Non custodial parents who are seeking visitation or custody may have a need for parent education and resources in order to assist them in knowing how to be safe, responsible and developmental in raising their children.

What activities will the attorneys in your District take to address this barrier or problem? For each checked activity, please provide a detailed description of your District's plan for implementing this activity.

BALA staff and volunteers, by using the Clients 2000 software, can use the hotline feature to refer clients to other services when needed. By establishing collaborative relationships with other programs, BALA staff is able to assist clients in linking with the right services for their problems. By referring clients to other services, especially services that assists in case work, the client has another support to help strengthen themselves and help them follow through in doing what is in their best interest over the long term.

This link between caseworkers and the legal community is worthwhile when the client has questions or concerns. A caseworker can help the client understand what a lawyer, paralegal or judge is saying and how it is pertinent to them. This translation is essential in breaking down the intimidation that a client will feel when facing the courts or legal system. This added assistance could help the client feel comfortable and confident enough to finish what they start in the legal system.

BALA will continue to reach out to the other social services providers in District 11 to strengthen those bonds.

Please check the activities, which your District will take to support the pro bono efforts of the attorneys in your District. For each checked activity, please provide a detailed description of the District's plan for implementation of this activity.

X Providing intake, screening, and referral of prospective clients:

BALA's staff and volunteers intake each client using the KEMPS Clients 2000 software package. This intake helps assess the client's income, personal situation and case. After the intake, BALA's Program Director will review the case and see what action is best taken. When appropriate, the Program Director will send the client a letter that says they are waiting to be referred. Our Pro Bono Coordinator then contacts attorneys on the county's panel until he gets on to accept the case. By making frequent visits to the lawyers in the area and by keeping in close contact via the phone, we are able to refer a client, on average in less than 3 months.

X Providing resources for litigation and out-of-pocket expenses:

BALA has a client's assistance line item in the budget. There is some uncertainty about the actual cost of this assistance, however estimations have placed it as high as \$6,000 per year for the District. One way to hold costs is through the waiving of fees, however when this is not possible, BALA is investigating using local dollars in conjunction with IOLTA dollars to provide the financial resources for the attorney's doing the cases. Through United Ways, Community Foundations, and state specialty grants; BALA is confident that money can be raised to consistently cover the costs of litigation and out-of-pocket expenses.

X Providing legal education and training for pro bono attorneys in specialized areas of law useful in providing pro bono civil legal service:

BALA has provided and will continue to provide CLE's for attorneys on topics such as Family Law and Domestic Violence.

X Providing the availability of consultation with attorneys who have expertise in areas of law in which a volunteer lawyer is providing pro bono civil legal service:

BALA Program Director Tammara Jo Sparks has ten years experience in working at Bartholomew Area Legal Aid. By screening cases, gathering information on those cases, advising and sometimes representing clients at hearings; Tammara is a veteran attorney who is a valuable resource to District 11's attorneys. Pro Bono Coordinator John Pushor has been an attorney in Bartholomew County for over 40 years. He provides advice and answers questions for attorneys who need help with referred cases. Other lawyers on BALA's panel do the same by being available to be consulted on disability law or small claims court. ILS-Bloomington and BALA also communicate regularly to ask questions that compliment the others expertise in a certain area of the law.

X Providing malpractice insurance for volunteer pro bono lawyers:

BALA, through its affiliation with NALDA, has malpractice insurance for all lawyers affiliated with Bartholomew Area Legal Aid.

X Establishing procedures to ensure adequate monitoring and follow-up, and to measure client satisfaction:

BALA already has the attorney file a report about the case result after the matter is closed. This report measures the result of the case, the manner in which the situation was rectified, the total number of hours spent on the case and a monetary quantification of the attorney's donation. BALA is developing an impact analysis for clients as well. By calling a sampling of clients after three to six months, BALA can ascertain what effects the services had on the client.

X Recognizing pro bono civil legal service by lawyers:

BALA has an annual flower day for attorneys in which each pro bono attorney that has taken a case will wear a carnation in their lapel. This recognition will happen in late summer/early fall and each county will have one day during the week for this recognition event. In the late fall and early winter, appreciation luncheon will be held for lawyers and their support staffs thanking them for their contribution. This event will not only recognize the lawyers, but the all essential paralegals and secretaries that do much to ensure the success of a good pro bono program.

Please describe the expected results and the measures, which you will utilize to determine the value to the indigent of the proposed activity.

BALA overall goal is to adequately serve all eligible applicants with the needed legal services.

The ways BALA currently measure this goal are as follows:

- 1) *Total number of applications taken in a year:* In 2001 BALA took 1602 applications. In 2000, BALA took 1255 applications. BALA estimates the cost of an application to the agency is \$25.00 per application. This cost includes time taking the application, time reviewing the application and all expenses associated with processing the application i.e. postage, copying, etc. BALA uses this statistic to gage overall need for the program.
- 2) *Total number of pro bono referrals in a year:* In 2001, BALA referred 358 cases. This referral number measures the number of clients that BALA serves and is capable of serving. There are many variables on the costs of a referral. In cases where BALA provides brief legal services or advice for a client in addition to the actual referral, the costs are higher. BALA uses this statistic to gage capacity for the program.
- 3) *Total financial contribution in a year:* In 2001, BALA accounted \$192,169 in contributed services. In 2000, BALA accounted \$108,807 in contributed services. These figures incorporate the donations of the pro bono attorneys and office volunteers who work for BALA. 95% of this figure can be attributed to pro bono attorneys. BALA uses this statistic to measure the overall value of the services donated.
- 4) *Total pro bono hours donated:* Hours are tracked per attorney, per county, or per case. BALA uses this statistic to determine how the burden of pro bono cases is distributed throughout the legal community and to determine averages of how long a type of case may take.

The ways BALA wants to add in the area of measurement:

- 1) *Post Service Interviews with clients:* BALA will start calling a sample of clients from different counties with different case types to determine the effect the services had on the client. By tracking these clients after a period of time, BALA can better understand the overall effect the services had on the client.
- 2) *Interview clients who did not complete services:* BALA will start contacting clients who did not complete services to determine the factor of why they dropped out. This process will better inform BALA if reasons clients quit can be dealt with by shifting internal processes, by linking clients better with external services, by educating clients or attorneys better, or if the reasons a client drops out are due to problems rectifying themselves.

Please provide your timeline for implementing and evaluating the recommended activities.

July to December 2002

- Develop new evaluation pieces, prepare interview questions, and allocate resources to attempt evaluation
- Schedule monthly meetings with District 11 Social Service Providers to explain BALA's services and mission.
- Establish toll free line
- In the 4th Quarter of 2002, pilot the new measurements and evaluation pieces.

January 2003

- Implement fully new measurement and evaluation pieces

March 2003

- Have established three formalized partnerships with social services providers for joint referrals and to allow for open communications between agencies for mutual clients.

July 2003

- Have estimated the revised capacity for District Pro Bono Services for the year 2003 and 2004
- Have established three more formalized partnerships with social services providers for joint referrals and to allow for open communication between agencies for mutual clients.

September 2003

- Develop and release reports as to why clients have abandoned legal services in the first two quarters in 2003
- Have recognized attorneys by having the flower day

October 2003

- Develop and release reports as to impact services had on clients' lives.
- Have established three more formalized partnerships with social services providers for joint referrals and to allow for open communication between agencies for mutual clients.

December 2003

- Have recognized attorneys and their staffs by hosting the appreciation luncheons.

BUDGET FORM

COST CATEGORY	IOLTA \$	OTHER \$	DONATED	TOTAL
A. Personnel Costs				
1. Lawyers	\$6,880	\$27,518	\$200,000	\$234,398
2. Director	\$6,180	\$24,720	0	\$30,900
3. Support Staff	\$7,709	\$30,839	\$19,442	\$57,990
4. Salary Subtotal	\$20,769	\$83,077	\$219,442	\$323,288
5. Payroll Taxes	\$1,589	\$6,355	0	\$7,944
6. Employee Benefits	\$767	\$3068	0	\$3,835
7. Total Personnel Costs	\$23,215	\$92,500	\$219,442	\$331,232
B. Non Personnel				
1. Space	\$900	\$3,600	\$16,086	\$20,586
2. Equipment Purchase	\$768	\$3,073	\$8,253	\$12,094
3. Office Supplies	\$247	\$987	0	\$1,234
4. Telephone	\$992	\$3,966	0	\$4,958
5. Travel	\$150	\$600	0	\$750
6. Training	\$200	\$800	0	\$1,000
7. Insurance	\$400	\$1,600	0	\$2,000
8. Dues and Fees	\$160	\$640	0	\$800
9. Professional Fees	\$600	\$2,400	0	\$3,000
10. Client Assistance	\$1,000	\$4,000	0	\$5,000
11. Other	\$481	\$1,926	0	\$2,407
12. Total Non Personnel Costs	\$5,808	\$23,232	\$24,339	\$53,379
C. Total Expenditures	\$29,023	\$116,092	\$243,781	\$388,896

List of Appendices

1. 2002 Funding Sources

2. List of BALA's Pro Bono Attorneys

Appendix A

BALA's Funding Sources

United Way of Bartholomew County	\$45,382
Indiana Criminal Justice Institute-Victims of Crime Act	\$28,793
IOLTA	\$26,300
Indiana Fathers and Families	\$15,600
Irwin-Sweeney-Miller Foundation	\$7,500
Cummins Engine Foundation	\$5,000
Community Legal Aid Fund	\$6,728
Interest	\$600
Other	\$300
Total	\$136,203

SUBMISSION PROCEDURES

Ten copies of the completed annual report and plan shall be submitted to: Jennifer Theresa Cloyd Konomos, Indiana Pro Bono Commission, 230 East Ohio Street, Fourth Floor Indianapolis, Indiana 46204. Plans should be submitted no later than 5:00 p.m. on July 1, 2002.

CHECKLIST FOR ANNUAL REPORT AND PLAN:

- _____ Pro Bono Annual Report and Plan for current year pp. 1-20 (10 copies)
- _____ Proposed budget pp 18-19 (10 copies)
- _____ Legal Service Provider Annual Progress Report p.11 (10 copies)
- _____ District Annual Progress Report p.12 (10 copies)
- _____ Enclosures (10 copies)
- _____ Disk in Word or Excel of all submitted materials or submission via e-mail at probono@inbar.org

ANNUAL TIME TABLE FOR SUBMISSION OF FORMS AND CHECKS:

January 1:	Checks distributed
January 31:	IBF final grant progress report for previous year due
June 1:	IBF mid-year grant progress report due
July 1:	Annual report, plan and grant application due to IPBC
November:	Notification of awards
December 1:	IBF grant agreement due and revised budget due (as needed)

Additional information concerning these instructions or the submission of a plan may be obtained from Jennifer Theresa Cloyd Konomos, Indiana Pro Bono Commission, 230 East Ohio Street, Fourth Floor Indianapolis, Indiana 46204 or by calling at 317-639-5465 or by e-mail at probono@inbar.org.